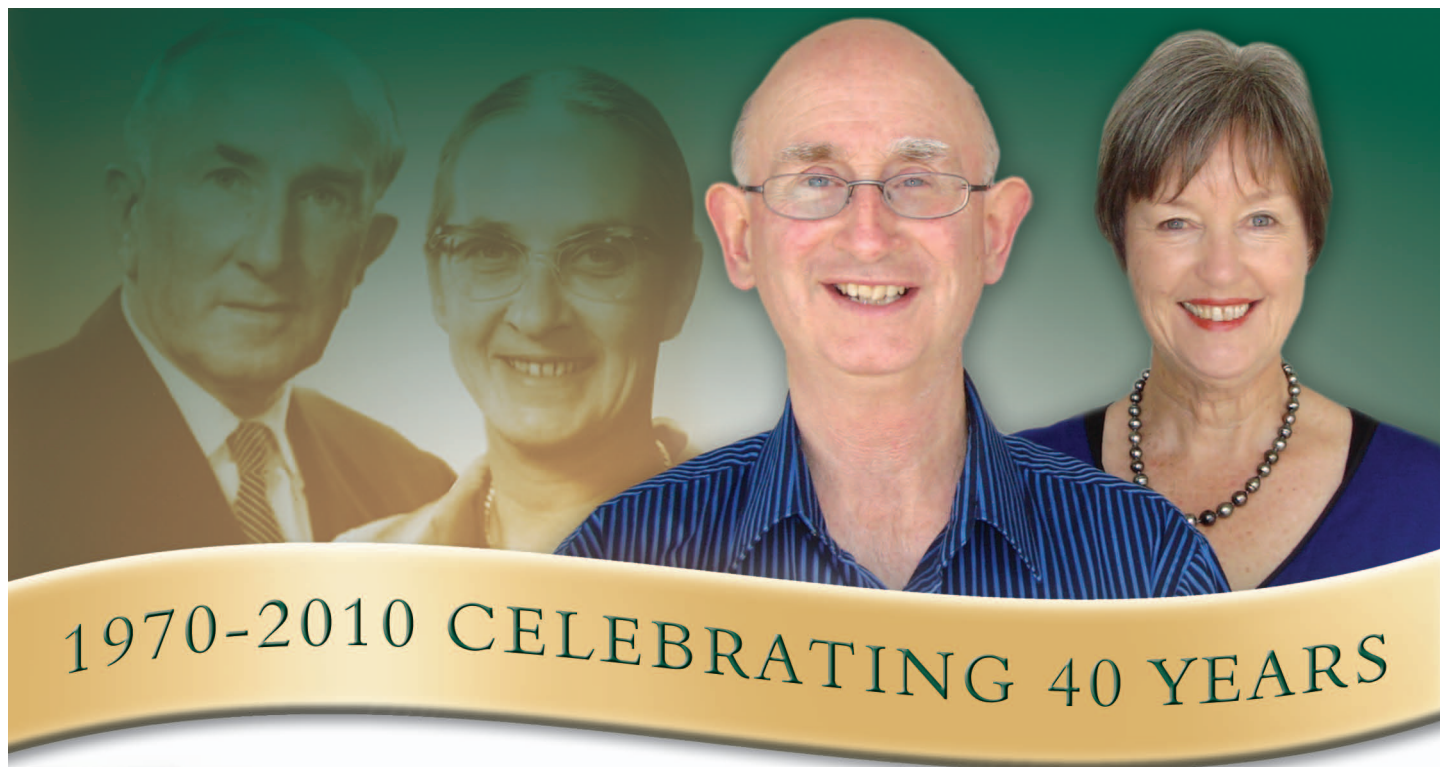




# RUA & CLARRIE STEVENS CHARITABLE TRUST (EST 1970)

*'The greater part in us will never die'*  
NGA MAHI RANGATIRA O TE TANGATA, KAHORE I PAHEMO

## NEWSLETTER NOVEMBER 2010



### MESSAGE FROM THE TRUSTEES & ADVISORY TRUSTEES

*(Written by Lee Stevens)*

HEI MAUMAHARA ME  
NGA WHAKAARO,  
INOI AROHA ATU.

*In remembrance,  
with loving thoughts  
and prayers.*

### Tena koutou katoa,

This year as we celebrate 40 years as a Memorial Trust we also remember, as per this beautiful Maori saying, my late parents whose ideals and values are epitomised by the ethos and philosophy of this Trust.

When Clarrie was a young law student completing his LLM honours 1st class he couldn't afford to pay for tuition for Latin amongst other subjects. A law lecturer at Otago University donated his services expressing the wish that when Clarrie was a practising lawyer he would, in turn, donate his services to those in our society whose financial circumstances precluded them from accessing the law.

He faithfully did this for some 50 years as well as donating his services to various NGO's.

Values such as these are very much the key component in our Trusts ethos and in our grant making- the philosophy of an on-going "Family of Beneficiaries," receiving continued support rather than one-off grants. We are acutely aware of how modest our grants are in the overall scheme

of things. But as has been highlighted on so many occasions by our grantees, our funding is of immense value to them because of its on-going nature and the reliability/loyalty component to that particular NGO.

Many of these funding partnerships go back many years- in particular; the late Sir Edmund Hillary's Himalayan Trust have been part of our 'family' since the Trust was established in 1970. Many have been added as time has past whilst some have been dis-continued. Over 45% of our current grants to our beneficiaries exceed 10 years of grant making.

This year we have some new blood - the Music Department of Tamaki College together with the Te Poho o Tamaki Maori Performing Arts Academy, also based at Tamaki College Glen Innes, Auckland.

We also have Penny's new Foundation, "The Liberty of Being Me Foundation," established earlier this year and driven by that raw passion that epitomises the sheer vitality of the NGO sector.

This year has been quite a remarkable period for me in terms of the connection with the Trusts original purpose.

The 12th of July, (the anniversary of both my late parents passing – with a gap of 25 years in between), found me back in my home town of Dunedin and making a pilgrimage to the graves of my parents and experiencing a remarkable "spiritual" connection whilst I was there.

What resonated was a tremendous feeling of great peace through my whole being & a realisation that this particular day was of such intimate importance to me in my philanthropic journey over the past 40 years.

Later in the day I attended the inaugural Joan Chadwick Award, named after Clarrie's legal secretary of 35 years at the Dunedin Community Law Centre - a most memorable way for me to mark this very special anniversary.

This past 40 years has also been one of immense pride and inspiration for me walking in the footsteps of my late father, who, deeply distressed at the sudden and premature death from Leukaemia in 1970 of his wife and “best friend”, established this Memorial Trust in her memory.

*“Often it is in the quiet crucible of one’s personal suffering that our noblest dreams are born.”* Quote

Clarrie dedicated the last 25 years of his life to this Charitable Trust as a legacy to Rua, providing financial and moral support to so many organisations.

In 1994 at the age of 86, (one year prior to his death), he retired as a Trustee and in his place was appointed his long time sharebroker, Mr Alex Burt, based in Sydney. Alex built on the solid financial foundations put in place by Clarrie and has developed and built a most successful, resilient and diversified Australian-based investment portfolio.

The Trust was negatively impacted by the Global Financial Crisis (GFC) and the Trustees have, in the short term, responded to this to protect its financial viability. (See financial report.)

In 1999, Penny was appointed a Trustee and her dedication and commitment to the Trust and its beneficiaries is exemplary. The Trust’s beneficiaries will be very much aware of her support to them in so many quiet ways over the years.

## TRUST 40th ANNIVERSARY

Theme- quote from Clarrie,

*“The Dreams of today are the common place of to-morrow.”*

If ever there was a year to celebrate the birth of this Trust, its longevity (and mine!), together with its grant making over this past 40 years, this year is it!!

An Anniversary Dinner will be held with the Trust’s current grantees plus some friends and supporters, with the Trust fully funding the event. This will be held on Saturday 26th of February 2011.

This will be a very special and memorable occasion. We have a superb keynote speaker, Mr John Prendergast Chair of Philanthropy NZ, CEO Community Trust of Southland, plus a quartet from the Auckland Philharmonic Orchestra to provide musical ambience together with one of this year’s recipients from the New Zealand Youth Choir who will also perform during the evening. We are also putting together a DVD to be shown during the evening.

I was recently going over the financial records of the Trust since its inception in 1970. I discovered - to my immense surprise - that both Clarrie and I had each year since the Trusts inception, made annual cash gifts to the Trust on the anniversary of Rua’s death ( 12th July) and her birthday (8th November.) On Clarrie’s passing in 1995 I added the anniversary of his birthday to my personal annual gifting programme to the Trust.

Over the years this modest annual cash gifting has totalled more than \$100,000. Clarrie personally gifted cash of \$53,000 as well as donating his professional services to the Trust over the last 25 years of his life.

In addition, each year we host a private dinner marking the anniversaries of their deaths (both on the 12th July - Clarrie 25 years to the day after his late wife’s death) and on their birthdays, another tradition going back to the inception of this Trust. These personal gestures epitomise in a very personal way, what this memorial Trust means to me. I have been doing this for 40 of my 62 years and from this personal dedication to the memory of my late parents has developed the Trust’s grant making, distributions now totalling over \$1million, plus an endowment fund, which, well managed, will continue in the future to distribute many blessings to community based organisations.

The 40th anniversary dinner is very much a time to celebrate the sheer joy and pleasure that one derives from their inner being of the true love and ethos of Philanthropy – which comes from the Greek word philanthropia, meaning “to love people”. The Trust is in GREAT heart, both “philosophically” and financially and we are looking forward with great excitement to our 40th celebration with our Trust’s Whanau and friends.

## THE TRUST’S GRANT MAKING PHILOSOPHY

As reported in last year’s annual newsletter, the Trustees have conducted a review of the Trust’s multi-year funding partnerships. The major impediment to the Trusts model of “long term funding”, now over many years, is the inability of the Trust to enter into new funding arrangements with other potential grantees as so much of the Trust’s annual income is allocated to the existing partnerships; in excess of 90% of annual grant distributions.

This restricts the Trust’s ability to respond to the rapid evolving changes that are occurring throughout our society. However, adopting a more flexible model is a major challenge as one weighs up continuing to support our current beneficiaries who are certainly as deserving as any new potential beneficiary.

How many funders are there who would continue this long term funding model that we continue to be so passionate about? On the other hand, the reality is that our Trust’s grants are modest and easily dwarfed by grants from regional community Trusts, the Lotteries Board and Gaming Trusts to name but a few. Our grants in effect are not that significant in the bigger picture.

However, as a family based Philanthropic Trust our whole ethos and value system has, and continues to be, based on long term funding partnerships. These develop into very enduring long term friendships and trust between our Family of Beneficiaries and ourselves. Equally importantly, we gain a greater depth, understanding and Trust of each of the organisations that we support.

Above all we have tried to conduct ourselves with total integrity and transparency in our funding partnerships. Based on feedback that we receive from our grantees, this long term level of commitment is extremely valued and reciprocated by them in so many positive ways. Multi-year funding (subject to funding availability) has been an integral part of the Trust’s philosophy since the Trust’s “Silver Jubilee celebratory dinner in November 1995. We began with a family of six NGO organisations. Fifteen years on, this Family of Beneficiaries currently comprises 16 organisations, most of whom have received on-going and increasing funding for a number of years.

This concept continues to very much resonate personally and, in this age of short term horizons, our values of long term consistency of on-going funding are in our view, well worth continuing. But it is interesting that, after all these years, we still continue to fine-tune and do some philosophical thinking on this topic!

The Trust’s Beneficiaries will change from time to time as the Trust picks up new multi-year funding partnerships based on needs that replace existing ones. As an example, this year, apart from Penny’s personal initiative the Trustees have entered into two new funding partnerships - Tamaki College Music Department and Te Poho o Tamaki Maori Performing Arts Academy, also based at Tamaki College.

The Trust’s partnerships have become a very important aspect of our lives and we continue to be inspired and energised by the outstanding work of the diverse organisations we support. In addition, from time to time the Trust will continue to make a small number of annual one-off grants, as it has in the past year with the Stella Trust, (P Drugs), and Samoan Tsunami Appeal.

In the past year, overall funding was allocated in the following way:

- 64% to operational costs
- 15% to programmes
- 21 % to scholarships.

## TRUSTEE PROFILE: ALEX BURT

Since his appointment as Trustee in 1994, Alex’s contribution to the Trust has been par excellence, building a dynamic growing investment base, principally Australian-based. The Trust’s ability to fund our Family of Beneficiaries is totally due to Alex’s expertise. He is an Australian-based investment senior executive, member of the Australian Stock Exchange and Chief Executive Officer with a leading edge investment company. Alex has spent over 40 years, Sydney-based, in the investment sector.

Alex’s current viewpoint on the markets is as follows.

*“The market continues to slowly recover from a near total collapse of the Global Financial System, which is now being fuelled by speculative exuberance in commodities on the widespread belief that the Chinese economy will continue to grow by more than 9% over the coming years.*

*We continue to face poor economic numbers out of the United States-industrial production and consumer confidence point to slower demand and a fragile growth.*

*Although industrial production in the Euro zone is relatively strong, Europe remains plagued by a host of economic issues and threatens to fall back into recession.*

*We will continue to take an extremely cautious approach, taking profits when considered appropriate, building up cash reserves."*



**Right to Left: Alex and his wife Carolyn, with Penny and Lee**

## ADVISORY TRUSTEES

We are especially appreciative of the on-going input, energy enthusiasm and professionalism from our Advisory Trustees, Darren and Victoria Priday. Darren established and continues to manage the Trust's website, [www.rcstevens.org.nz](http://www.rcstevens.org.nz). At a time suitable to them both Darren & Victoria will become Trustees of this Trust.



**Penny, Darren, Victoria and Lee**

## FINANCIAL UPDATE FOR YEAR ENDED 31ST MARCH 2010

### Financial Performance

The Trustees report in this 40th year since the Trust's inception that direct Investment income decreased by 11% (previous year increase of 14%).

This decrease was attributed to reduced investment income due to the Global Financial Crisis (GFC), offset by lower expenses. There were also some realised capital profits during the year.

In the midst of the GFC grants were temporarily reduced for the year ended 31st March 2010 by \$14,095 (23%) to \$45,915. In this current year 2010/11 to commemorate our fantastic 40th milestone the Trustees are distributing a record in grants this year of over \$70,000.00 which has enabled the Trust to both generously fund Penny's new Foundation, (The Liberty of Being Me) plus meet our on-going annual grants to the Trusts longstanding grantees.

This has been made possible by utilizing a very modest component of realised capital profits generated in the previous years.

Based on current projections, over the next 2-3 years the investment income is projected to recover and commence a growth trajectory.

The Trust has no indebtedness.

### Statement of Financial Position

The net investments of the Trust significantly recovered during the year by 32%. In 2009 they fell by 20% reflecting the major down turn of the equity markets in the most significant upheaval since the end of World War II.

Annualised returns for the year under review total 37.12% reflecting, in the main the significant recovery of the markets, compared with last year's (16.1%).

The Trustees reiterate their long term investment philosophy and are totally comfortable with the Trust's current share holdings.

Each year we acknowledge the enormous input and skill and expertise of the senior Trustee Mr Alex Burt and this acknowledgment is even more deserved in the current volatility. His steady and skilled wise counsel has ensured that the Trust remains in an exceptionally sound and stable financial position.

## Distributions

The average grant this year was \$3,532 (last year \$3,708). The Trust's benchmark average grant distribution is \$5,000. Currently three organisations receive this amount or greater (six last year) and grants will be increased progressively to this benchmark.

**Cash distributions totalling \$45,915 were made to 13 organisations.**

Grants to the Trust's Family of Beneficiaries (ongoing grants) totalled \$41,012 this year. These grants represent 89% (last year 83%) of the Trust's total grants. The remaining 11% were one-off grants.

The Trust's distribution priorities continue to be focused on:

- Increasing the Rua Stevens Award to \$5,000 per annum.
- Increasing the Himalayan Trusts grant to \$5,000.00pa- next year marks their 50th anniversary.
- Building greater uniformity/equality with the levels of our grant making.

## Funds were allocated to the following sectors:

Organisations	2010	%	2009	%	Benchmark
Art/Cultural	\$ 9,000	21%	\$13,300	22%	20%
Community	\$ 8,469	16%	\$17,000	29%	15%
Education	\$22,446	50%	\$16,600	28%	30%
Environment			\$ 5,200	9%	10%
Faith Giving	\$ 4,000	9%	\$ 5,230	9%	10%
Youth	\$ 2,000	4%	\$ 2,000	3%	15%
<b>Total</b>	<b>\$45,915</b>	<b>100%</b>	<b>\$59,330</b>	<b>100%</b>	<b>100%</b>

**Distributions since the Trust's inception in 1970 now exceed \$1 million.**

## THE ARTS

*Distributions totalling \$9,000, representing 21% of total grants, were made to two organisations, previously three. This was a reduction from last year's allocation of \$13,700.*

### Royal New Zealand Ballet

**General Manager:** Ms Amanda Skoog

**Grant Allocation:** \$7,800

**Project Funded:** Annual Partner a Dancer scheme.

**Alessia Lugoboni**, our sponsored dancer, was born in Verona, Italy. Alessia studied briefly on a scholarship at the New Zealand School of Dance in 2001. Between 2002 and 2003 she trained at the English National Ballet School. On graduation Alessia joined the cast of Das Phantom der Oper in Stuttgart. The 24 year old, who speaks Italian, English, German and French, joined the company in 2004. Our Trust has sponsored her since then.

### Recent roles include:

RED -Alessia performed the alternate roles of Columbine and Angel in the local wedding scene. She also danced as one of the stately ballroom guests in Act 1 and vivacious townspeople in Act 2. Don Quixote- Alessia performed as one of the colourful townspeople in Act 1, a fiery gypsy in Act 2 and one of Kitri's elegant bridesmaids in Act 3. She also performed in the dancers' choreographic workshop in May and toured to Sydney with RED.

This year we farewelled Alessia after sponsoring her for 5 years as she returns initially to her home city of Verona, Italy and we welcome a new dancer, **Paul Russell**, aged 18 from Australia.





Penny, Paul, Alessia and Lee

**Grants distributed to the Royal New Zealand Ballet since 1971 total \$140,375.**

## New Zealand Youth Choir

**Artistic Director:** Dr Karen Grylls

**Grant Allocation:** \$1,200

This organisation provides advanced choral training, performance and touring opportunities for nationally selected young New Zealand singers aged between 18-26 years.

**Project Funded:** Two scholarships (\$550 each) to enable 2 young singers to realise their full potential through covering the cost of vocal tuition to improve their musicianship vocal abilities.

## Rua and Clarrie Stevens Charitable Trust scholarship recipients:

### Emily Bruce

Emily successfully auditioned for the 2008-10 New Zealand Youth Choir in December 2007. Emily has always loved singing and has been involved with choirs since she was a child. She has also taken on an organisational role on the committee of the Wellington Youth Choir. Emily is currently undertaking a BA(Hons) in German and French and an LLB at Victoria University.

Emily will use this scholarship to continue with music lessons to improve her singing and musician skills. She believes that this helps her greatly both as an individual and in her contribution to the choir. Emily is currently receiving vocal training tuition from Lesley Graham.

### Jasmine Lee

Jasmine successfully auditioned for the 2008-10 New Zealand Youth Choir in December 2007. Jasmine has participated in choirs since primary school in Taiwan, and continued to do so when she moved to New Zealand in 2000. She is currently conducting the girl's chamber choir at Albany Junior School and is completing her Bachelor of Music degree at the University of Auckland.

Jasmine will use this scholarship to improve her vocal skills, which she believes will help to develop her ability as a choral singer, soloist, conductor, and improve her contribution to the NZ Youth Choir. Jasmine is currently receiving vocal tuition from Shelagh Richardson.



Penny, Emily, Jasmine and Lee

## Measuring Outcomes:

- Specific criteria for application.
- Measured against criteria.
- Regular reporting to the Trust & full accountability report.
- Opportunity to meet recipients, where possible involve in Trust activities.

**Grants paid to Tower NZ Youth Choir since 2002 total \$6,700.**

# COMMUNITY

*Distributions totalling \$8,469, representing 16% of total grants, was a reduction of \$8,531 from last year. These grants included two on-going funding partnerships, one new funding partnership and two one-off grants.*

## The New Zealand Ethnic Employment Education & Youth Development Charitable Trust

**Community Leader:** Mahad Warsame

**Grant allocation:** \$2,500



Somali youth

**Project Funded:** Funding was provided to support the Academic High School Project for immigrant & refugee students being run by Lynnfield College.

The project has been running for the past year and a half and is a very successful programme enhancing the literacy and numeracy of students with a refugee background. Funding is

utilised to pay for use of the school premises, transportation, teacher salaries and resources.

## Beneficial Outcomes of the Grant:

- Reduce the drop-out rate for students.
- Increase literacy and numeracy for Somali students contributing to good outcomes for the wider New Zealand society.

**Grants distributed to the Somali Community Association since 2004 total \$26,000.**

## Himalayan Trust

**Founded by the Late Sir Edmund Hillary, KG, KBE, ONZ:**

Adventurer and Humanitarian.

**Grant Allocation:** \$2,500

The Himalayan Trust was one of the very early recipients of our Trust. Our first grant was given in 1972. This was at the instigation of Clarrie who greatly admired Sir Ed's outstanding loyalty and commitment to his Sherpa friends. Clarrie continued to personally direct grants to this Trust throughout the 1970s and 80s. We met Tenzing Norgay Sherpa when Ed brought him out to New Zealand on a nationwide tour.

In June 2008, Penny and I visited Lady Hillary at her home to discuss our Trust's support for the Himalayan Trust. We decided to focus on funding a specific area of the work the Himalayan Trust does on an on-going basis and agreed to sponsor one of the 27 schools established and maintained by the Himalayan Trust. The school that we are currently funding is the Himalayan Dudhkundha Lower Secondary School, at Phaplu.

Solukhumbu district in Nepal, where the highest mountain on earth is situated, is beautiful with chains of mountains, rich landscape topography, clean and green environment and friendly culture and tradition of people of different caste and creeds.

'Education to all' is the policy of the Nepalese Government. But due to remoteness and poverty in the country, government resources have not been adequate and only seem to have been confined to policy.

To meet the ever growing demand and requirement of the schools, students and community, in the northern part of Solukhumbu the Himalayan Trust has been supporting health and education and has produced many well educated individuals.

Phaplu School is one school that has received continued support from the Himalayan Trust over two decades.

*"In the fiscal year 2008-2009, the first grant to Phaplu school from the R & C Stevens Charitable Trust was used to upgrade a classroom - wooden wall panelling, ceiling work with local timber, the purchase of a computer and electrification of the class room for computer use.*

*In 2009-2010, the Trust's grant was used for further interior work, another computer and was put towards two new class rooms. These rooms are now ready for use by the school pupils.*

*For the fiscal year 2010-2011, the Trust's grant will be allocated towards remaining classroom upgrades and for the building of two toilets."*

**Report from Sunil Karki, Headmaster**  
**Dudkunda Himalayan Lower Secondary School, Phaplu.**

2011 marks the 50th anniversary of the Himalayan Trust and both Penny and I are planning to visit Nepal next May to attend the 50th anniversary dinner in Katmandu and also visit Phaplu school in Nepal that our Trust supports.

We have now aligned our annual grant distribution to the birth date of the late Sir Edmund Hillary, 20th July.

**Grants distributed to The Himalayan Trust since 1972 total \$17,500.**



## ONE-OFF GRANTS

**Stella Trust ( To fight the Drug P.)**  
**Grant Allocation:** \$653

**Samoan Tsunami**  
**Grant Allocation:** \$250

**Cooking & Friendship Class**  
**Co-ordinator:** Mrs Penny Stevens  
**Grant Allocation:** \$2,566

**Project Funded:** In July 2000 Penny instigated, with support from her Auckland BPW Club, this project to encourage integration with our migrant & refugee women. This is done by each month having a migrant cooking and sharing a meal from their homeland and their culture with the group.

Initially launched with Somali women, it then expanded with the addition of Bangladesh, Burmese, Sri Lankan, Singapore, Kenyan, Kiwi and others.



Cooking and Friendship Workshop.

This programme greatly enriches each others lives with its diversity. In its first year the project was fully funded by the Auckland City Council and subsequently by Philanthropic Trusts including this one. In 2009 this Trust took over fully funding the project.

This year there will be a celebration to mark 10 years since the programme was launched. The project is also expanding in October of this year to the Auckland suburb of Royal Oak.

**Grants distributed to the Cooking & Friendship Class since 2007 total \$3,868.**

## EDUCATION SECTOR

*Distributions totalling \$22,446, representing 50% of total grants, were made to four organisations. This was an increase of 35% over last year. These grants include scholarships in the memory of Rua & Clarrie, plus Penny's new initiative – "The Liberty of Being Me Foundation."*

### CLARRIE STEVENS MEMORIAL LAW SCHOLARSHIP

**Grant Allocation:** \$5,000

Established in memory of Clarrie Stevens, the Clarrie Stevens Memorial Law Scholarship is awarded to assist meritorious senior law students complete their course at the University of Otago.

The Scholarship started in 1998 and is awarded in the final year of study for the degree of Bachelor of Law or Bachelor of Law with Honours. Preference is given to candidates who have demonstrated special ability in the areas of Will & Trusts or Commercial Law, as these were areas of special interest and expertise to Clarrie.

Financial need as well as academic ability is taken into account in awarding the scholarship. Clarrie came from a low-income family background. His father died when he was very young, both he and his brother worked fulltime to put themselves through law, and at the same time they personally funded their two sisters to attend private schools.

Clarrie's life was dominated by his love and passion of the law. He graduated LLB (NZ) in 1931 and LLM (NZ) with first class honours in 1934. Clarrie held a very strong belief that the law profession had a duty to donate its services to those disadvantaged in our society. He freely donated his services to numerous individuals, including members of the clergy, who could not otherwise afford to hire a lawyer. This was long before the concept of legal aid came into being. He was also honorary solicitor to a number of Dunedin-based charities.

The Scholarship is awarded by a Dunedin-based Scholarship Committee which includes two Dunedin lawyers, Mr Geoff Thomas who is a partner at Anderson, Lloyd, Caudwell. And Roger Macassey, partner of Gallaway, Cook, Allan. Mr John Smillie, Professor of Law at Otago University, is also on the committee. The Trustees express their appreciation for the valued input from this Committee.

This year's successful scholarship recipient was **Sally Louise Woods**. Sally is currently studying in her final year LLB (Hons) and resides at Warrington, just north of Dunedin where she enjoys encounters with wildlife including



L-R Law Panel: John Smillie, Sally Louise Woods, Scholarship recipient, Geoff Thomas, Roger Macassey.



Hector's dolphins and sea lions.

Her community involvement includes participation in the Warrington Reserve Spit Group which works to enhance the area, including native tree planning and rubbish collection.

Sally has been a social worker for the past ten years and her initial interest in Law grew from the exposure she had to Court work and lawyers via child protection. She went back to university with the intention of working in Family Law. Ideally she would like to work in a local firm that gives her an opportunity to work in family property in the broadest sense, encompassing relationship property, trusts and estates.

Sally is a mature student with a mortgage and the financial commitments that come with owning a small home. Sally works part time during the University term and full-time during the University holidays at Child Youth and Family in Oamaru and attempts to save the bulk of her earnings from the summer to supplement the University year.

Grants distributed through the Clarrie Stevens Memorial Law Scholarship since 1998 total \$44,000, awarded to 14 Law Students.

## DUNEDIN COMMUNITY LAW CENTRE

The Law Centre provides general legal information, runs legal educational talks for community groups, and provides specific advice and representation for individuals. Through these processes, they are contacted by close to 8,000 people a year. Each year they have 120 law student volunteers rostered onto their advice shifts, education programme, and prison advice roster.

In 2008, the 10th anniversary of my late father's Law Scholarship was marked in two ways:

- The Trustees increased the scholarship to \$5,000 pa.
- The Trustees further marked this anniversary with a Capital gift of \$5,000 to the Dunedin Community Law Centre. The income generated from this fund will be used to award an annual prize to the law student who has contributed in a practical and ongoing way to the work of the Law Centre.

This new award has been named after Clarrie's legal secretary, Joan Bethia Chadwick, who worked for him for over 35 years.

When Joan died in 2000 she bequeathed a generous legacy to the Trust. She gave outstanding support for many years to both Clarrie and I following Rua's death. Joan was a deeply loved member of our extended family.

On the 12th July 2010 it was a great pleasure for me to attend the 30th anniversary of the Dunedin Community Law Centre and hand over the inaugural Award to Joschka Hoffmann.

Joschka, a 25 year old German, moved to New Zealand in 2005 after having come to NZ in 2002 on an exchange and meeting his girlfriend, (now his wife) at Dunedin's Kavagh College. He did social work for a year before entering University in 2006. He is currently studying Law & Politics (double degree), with special interests in commercial law, law & medicine, and legal ethics.



L - R: Barry Allen, Grant Walker, Joschka Hoffmann (Awardee), Lee Stevens, Carol O'Connor & Mark Henaghan.

## New Horizons for Women Trust (Inc.)

**Chair:** Lyn Dowsett

**Grant Allocation:** \$3,600

New Horizons for Women Trust has been providing grants to women to develop their potential in the fields of education and employment since 1991. It specifically assists women into second chance education and training opportunities where individual circumstances require special support.

This is the 12th year that our Trust has supported this unique programme for women. Our recipients are mainly from Maori or Pacific communities. We are very appreciative of the opportunity to accord a scholarship in memory of Rua via this Trust.

The New Horizons for Women Trust also funds individual or group research projects. Under directed supervision in statutory institutions, or the community, issues relating to women and families are examined; the research must benefit the wider communities. These grants are open to all women in New Zealand and are not restricted to a geographical area.

The New Horizons for Women Trust has supported over 230 women in New Zealand to return to education or undertake research on issues that impact on women, since making its first awards in 1993. Over \$650,000 has been invested in these very worthy causes. Funding is obtained through a combination of fundraising, sponsorship, donations and bequests.

Project Funded: Second Chance Training Award. Our grant is by way of a memorial to Rua, with funding allocated to a Second Chance Training Award. Preference is given to an applicant in early childhood education, matching the interest of Rua who, in her early years, was a kindergarten teacher.



Recipient Moana O'Sullivan & son Tenzin Rain

This year's recipient was Moana O'Sullivan who is studying for a Bachelor of Education (Steiner Speciality) at AUT-Akoranga Campus. Moana also assists other Maori and Pacific students in her role as a Tuakana Teaching Assistant at AUT.

Moana has a four-year old son but is without Whanau support having moved to do this specialised course. Her referees described her as a "model candidate" for this award.

## Beneficial Outcomes of the Grant

The Second Chance Award makes a real difference to the lives of women, their families, and communities. The award offers empowerment for an individual in a disadvantaged situation.

The recipient becomes confident, has a real sense of achievement, and recognition that someone believes and values them and their contribution to our community. They realise that they can and will make a difference. This is evident in seeing the direction and success of previous recipients of New Horizon Awards.

## Grants distributed to the New Horizons for Women Trust since 1998 total \$27,100.

## Remuera Baptist Kindergarten

**Manager:** Alison Silvester

**Grant Allocation:** \$2,000

The Advisory Trustees, (Darren & Victoria Priday), allocated funding to a local kindergarten, the Remuera Baptist Kindergarten, in a major upgrade to its outdoor area and playground. The existing playground was very basic, offered little protection from the sun and was dated in what it offered the children's development. The Trust's donation funded the central structure of the playground, a wooden platform that children climb on, swing from and play house under.

This exciting project has been supported for two years, enabling the Trust to provide total grants of \$5,000 towards the cost of the upgrade. This is the second of two instalments with \$3,000 having been distributed in 2008. The total cost of the upgrade is estimated at \$70,000 and includes a shade sail, soft-fall flooring, sandpit (with built in rowboat!) and hand operated pump.

The Advisory Trustees were especially glad to be able to make a contribution to early childhood education as Rua herself was a kindergarten teacher and helped raise funding in this sector. This contribution has been gratefully received and the kindergarten has erected a plaque on the new

playground acknowledging our support.

### Beneficial Outcomes of Grant

- Provides a safer, more diverse area for the children attending the kindergarten – for years to come.
- Creates a more functional space which can be adapted for multiple purposes.



Penny, Lee, Darren, Bethany & Alison

## The Liberty of Being Me Foundation

**Initiated & Coordinated by:** Penny Stevens

**Grant Allocation:** \$11,846



Participants with Dr Christina Berton

Penny attended a "Say no to violence" workshop at the 26th International BPW "Power to make a difference" Congress (Mexico City, October 2008) and felt so inspired by listening to Christina Berton she resolved to bring her to New Zealand to share her vision. This coincided with a focus by the New Zealand Federation of BPW to celebrate their 70th anniversary by way of highlighting the issue of family violence in New Zealand.

Dr Christina Berton is a Self Esteem expert whose work in Mexico has reached 11,500 women and girls. Christina takes a very fresh approach to the issue of family violence approaching it by way of looking at individual's "Self Esteem." This allows one to see how it is in the perception of how each of us sees ourselves and is directly connected with how we behave and act towards others. Christina arrived in New Zealand on the 16th October 2009 for a national tour including Auckland, Wellington, Christchurch and Dunedin. Over 400 women took part in these presentations and workshops with some brilliant feedback received.

The Trust provided some funding towards the tour and fully funded the costs of a DVD. "The Liberty of being Me: Empowering Women through Self Esteem" was filmed by award winning Tuatara Films during her visit and invites women to think about their self-esteem, truly valuing themselves and how their empowerment can help themselves and those around them.

"True and honest acceptance...really believing that this is who I am, and that it's ok to be who I am... that's what we all strive for" says Christina.

The DVD's are available from the Trust for \$15.00 (+ \$4.50 P & P) and are highly suitable for personal use as well as group workshops. Please refer to our website ([www.rcstevens.org.nz](http://www.rcstevens.org.nz)) for a preview and an order form to purchase.

From the positive attributes flowing from this National Tour was borne a new Foundation, initiated by Penny called, "The Liberty of Being Me," Foundation. Christina returned to New Zealand from Mexico in late March 2010 to celebrate the launch of this new Foundation and to run the Foundation's first Mother/Daughters workshops as well as training facilitators/supervisors to run workshops initially throughout the Auckland region.

This programme is based on the successful model Christina has developed and runs in Mexico under her Not For Profit Amara Foundation which has had such a positive impact since it began in 2007.

This Foundation has become one of the Trusts, "Family of Beneficiaries," and the Trust is providing further significant funding in 2010 and will do so thereafter. Facilitators have been trained to run the 3 hour workshops and a part time person has been employed to assist Penny as the Foundation continues to quietly expand.

The Trustees for the Foundation comprise Penny: In addition to being a Trustee of this Charitable Trust, also Past President BPW Auckland. Founder/ Coordinator Cooking & Friendship project for refugee and migrant women, Initiator/co ordinator for the Christina Berton National Tour. Mrs Barbara Te Kare has 32 year's as a community social worker, Social worker in schools, Vice Chair Ruapotaka Marae, Director of Te Waipuna Puawai Mercy Oasis, board of Trustees Tamaki College. Captured and supported the vision of Christina's message from its inception. Alison Sykora is an independent communications and corporate reputation expert and a trustee of the Vodafone Foundation. During her ten year career in corporate NZ she has been actively involved in corporate/non profit partnerships and is a former member of the Robin Hood Foundation board. Lee Stevens - who over sees the foundations finances.

## FAITH BASED GIVING

*Distributions totalling \$4,000 representing 9% of total grants were made to two organisations. This was a reduction of \$1,230 over the previous year's grant.*

Both Rua and Clarrie had strong Christian values. Rua was a regular church attendee whilst Clarrie often quoted texts from the bible and lived those texts in his daily life. One memorable text he often quoted to me was, "The Lord loves the cheerful giver." He also donated, from time to time, his legal services to his local parish.

How apt that, in later life, he followed this through and established this memorial trust in loving memory of his beloved wife. Likewise, the Trustees of this memorial trust give very much with a cheerful heart.

### Crystal Cathedral Ministries (NZ)

**Founding Pastor:** Robert H Schuller

**Grant allocation:** \$1,500

Hour of Power, the televised church service from the Crystal Cathedral in Southern California, is well known because of the beautiful music, touching life stories and positive messages shared week by week.

The founding Pastor is Dr Robert H Schuller, well known for his many books on Possibility Thinking. Hour of Power is the longest running religious programme in the United States and reaches over 250 million people worldwide each week. Hour of Power has been broadcast in New Zealand since 1995 and is now on Prime TV at 7.30am on Sundays. From the outset Hour of Power has been a top rating religious programme.



Lily Ty, Laura Herbst & Nancy Goodwin

The main focus of the ministry in New Zealand is to keep the programme on air but it also provides materials and information for viewers and supporters. Ministry offices have been established in twelve countries each working towards becoming fully self supporting, a status already reached by New Zealand through the generosity of viewers & supporters.

The greatest proportion of our support comes from pledged donations ranging from \$15 to \$240 per month. Sales of books, recordings and other items stocked by the Auckland office add to this.

Since the advent of the recession the number of first time contacts has doubled as have the sales of DVDs of the weekly programme.

The format of the programme with its high quality music incorporating both traditional and modern streams, the guests who share their stories of triumph over tragedy and the practical inspiring messages brings inspiration, encouragement and hope to viewers in New Zealand.

**Funds distributed through the Crystal Cathedral Ministries since 2006 total \$5,100.**

## Te Waipuna Puawai Mercy Oasis

**Manager:** Ms Puamiria Maaka

**Grant Allocation:** \$2,500

Te Waipuna Puawai Mercy Oasis is a community development initiative of the Sisters of Mercy New Zealand. It serves some of the most vulnerable Whanau in Glen Innes and surrounding low-income areas. It was established in 1999 following a three-year community consultation process that involved local Maori, community agencies and other interested persons.

Projects Funded: Implementation of a new life skills and educational programme targeted at pregnant teens and teen mothers from the East Auckland area. Transport and childcare is provided as a way to remove barriers to access/participation.

Due to the skills of the programme's coordinator (Masters in Applied Social Work), the programme is able to provide intensive social work interventions as required by a number of the teens involved in the programme.



### Beneficial Outcomes of the Grant

- Young mothers furthering their education.
- Young mothers improving their parenting skills.
- Young mothers having the confidence to access existing services available to them in their communities.

**Funds distributed since 1994 to the Te Waipuna Puawai Mercy Oasis total \$9,440.**

---

## YOUTH SECTOR

*Distributions to one organization totalled \$2,000.00 represented 4% of total grants and was the amount as the previous year.*

### Otago Youth Wellness Trust

**General Manager:** Ms Barbara Payton

**Grant Allocation:** \$2,000

This Dunedin based youth trust was established in 1996. The inaugural Chair was Pat Harrison, former Principal of Queens High School. Currently this Trust works with over 300 young people annually in a variety of extremely well evaluated and successful programmes.

Funding was allocated toward the Trusts' free wraparound service for young people aged 11 to 18 years who have multiple needs and are viewed as high risk but who do not/will not use mainstream services.



RUA & CLARRIE STEVENS  
CHARITABLE TRUST  
EST 1970

16 FERN GLEN ROAD (NORTH)  
ST HELIERS, AUCKLAND, NEW ZEALAND  
PHONE: 09 575 7856 FAX: 09 575 7856 EMAIL: [leepens@r.c.stevens.org.nz](mailto:leepens@r.c.stevens.org.nz)

TRUSTEES: MR L.O. STEVENS, MRE P.A. STEVENS, MR A. BURT  
ADVISORY TRUSTEES: MR D. PRIDAY & MRS V. PRIDAY  
[www.rcstevens.org.nz](http://www.rcstevens.org.nz)